



# Superior Court of California County of San Diego

MADGE BRADLEY BUILDING

1409 4TH AVENUE

SAN DIEGO, CA

92101-3105

PROBATE DIVISION

619-687-2000

## C O N F I D E N T I A L

### ANNUAL INFORMATION STATEMENT

#### PRIVATE PROFESSIONAL CONSERVATOR GUARDIAN OR TRUSTEE

(Probate Code Sections 2340, 2341, 2342, 2343)

DATE: \_\_\_\_\_

NAME: \_\_\_\_\_

Business  
Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Phone: \_\_\_\_\_  
Fax: \_\_\_\_\_  
Cell Phone: \_\_\_\_\_

Residence  
Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Phone: \_\_\_\_\_

#### Educational Background

High School	Name	City & State	Years	Cert. Or Degree
	_____	_____	_____	_____
	_____	_____	_____	_____
College:	_____	_____	_____	_____
	_____	_____	_____	_____
Other:	_____	_____	_____	_____
	_____	_____	_____	_____

Attach additional sheets if necessary.

#### Professional experience

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Attach additional sheets if necessary.

ANNUAL INFORMATION STATEMENT

Name: \_\_\_\_\_

Date: \_\_\_\_\_

Professional References (List 3)

Name	Position	Address	Phone
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Removal or Resignation

I ☐ have ☐ have not been removed as conservator guardian or trustee.

I ☐ have ☐ have not resigned as conservator guardian or trustee.

See Attachment for particulars, including circumstances causing removal or resignation, case name and number and court location.

Closed Cases (List ALL closed cases)

Name	Case Number	Court Location	Year Closed
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Attach additional sheets if necessary.

CURRENT CASES (List All)

Name of Conservatee	Case # & Court	\$ value of Assets
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Attach additional sheets if necessary.

**Total aggregate dollar value of current conservatorships and guardianships: \$** \_\_\_\_\_

Other Financial Interests

☐ Neither I nor my immediate family have any financial interest in any business which may render services to any ward or conservatee for which compensation will be paid from the assets under my control.

☐ Either I or my immediate family DO HAVE a financial interest in a business which may render services to a ward or conservatee for which compensation may be paid from assets under my control, and a detailed expiation is herewith furnished.

Attach additional sheet.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date: \_\_\_\_\_

\_\_\_\_\_  
Signature